Search Organization
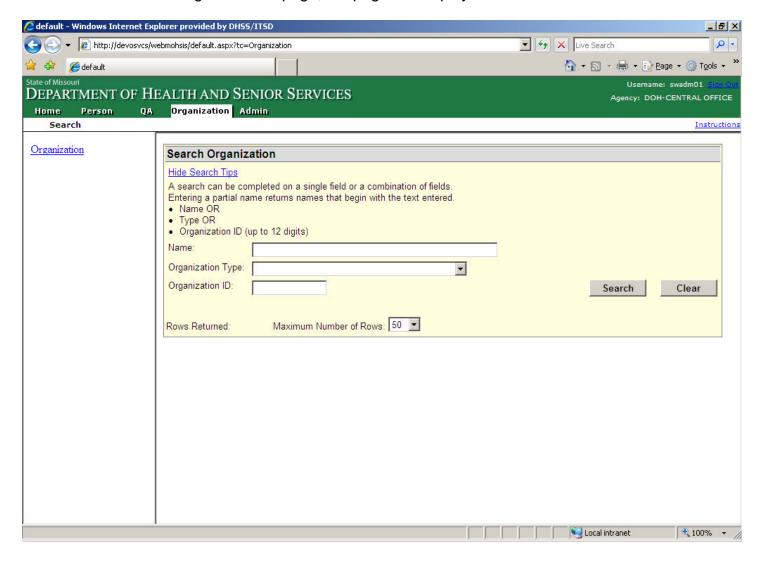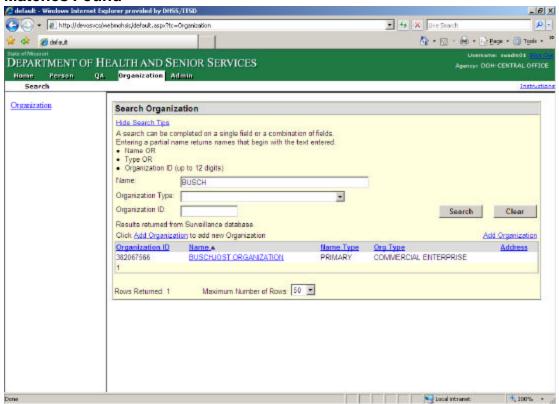
I. Screen prototype:

When the user first navigates to the page, the page will display:
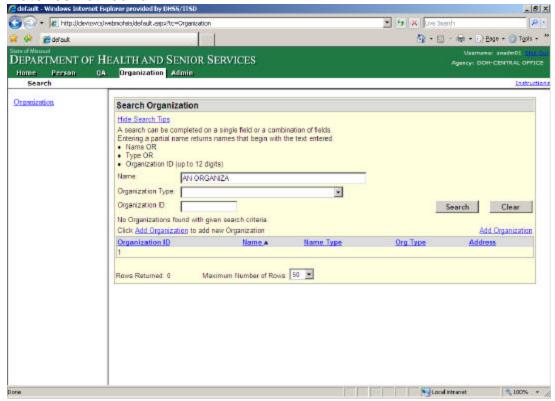
II. Search Surveillance Results
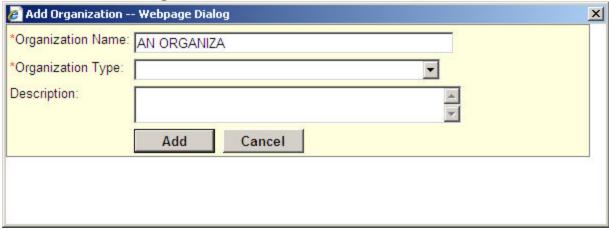
Matches Found

Matches not found

Click Add New Organization

Complete information and click Save.

III. Validate the following:

a. The page displays as per web standards
b. Drop down lists are loaded correctly:
   - **Organization Type -** (SURVWEB_LOOKUP_VALUE table LIST_NAME: ORGANIZATION TYPE)
   - **Name Type** (LU_LOOKUP – TYPE 1810?)
c. Display list as follows:
   o Addresses link
   o Name
   o Name Type
   o Organization Type
d. Sort list as follows:
   o **Names** sort ascending
e. Paging will be available in the grid when there are more than five rows of information. Keep the current sort order when paging.
f. All text boxes transform text to uppercase on entry.
g. Trim all spaces from the beginning and end of textbox text before checking it for errors and before using it as a filter.
h. When the user scrolls, save the position. When the screen reloads, use the latest scroll position to redisplay the screen in the same position as it was before the reload.
i. Date Fields: (NA)

   o Display should include label, entry field, calendar icon, and format [Label: ⬚⬚ 📝] (mmddyyyy)]
   o The calendar controls works correctly.
   o Display Invalid Date directly under the Date field that is not a valid date (i.e. does not have a valid month day year combination) as soon as the user leaves the field. Earliest valid date is 01011800.
   o Date fields - listed above – 8 (must have day in this date so it must be exactly 8 digits)
j. No more than the maximum number of characters can be entered into the following fields:
   o Name - 64
k. The following error messages display in the order of the fields on the screen if applicable when the user clicks the Search button:
   - **Search error messages**
     o Name must be alphabetic, punctuation cannot be entered

       ○ Refine search or increase Maximum Number of Rows
- **Add error message**
  - Organization Type is required.
  - Organization Name is required.
  - Organization Name must be alphabetic, punctuation cannot be entered.

IV. Buttons & Links

a. Validation to display messages to the user will not be performed on click of **Clear**

b. When click the calendar icon and select a date, keep the cursor on the date field so the user can tab to the next field.

c. When click the **Search** button, build the Search query as follows. If the number of rows returned is equal to or greater than the Maximum Number of Rows, then return and display data only up to the Maximum Number of Rows and display the error message of "Refine search or increase Maximum Number of Rows". Either way, display Rows Returned.
  1. Using AND for only the filters entered
  2. Using LIKE for Last Name and First Name to return names that <u>start with</u> those filters including AKAs and other names the person is known as, but the results will display just the Primary Name.
  3. Using exact matches on Date of Birth

d. When click the **Clear** button, 1) clear out the entry fields in that section and 2) clear out error messages in that section.

e. When you click the **Add New Organization** button, return Add Organization Screen.

f. When you click SAVE, add records to the database(survweb_party, survweb_party_name, survweb_party_organizationb) and return the organization in the tree view with the organization demographics page displayed in the right frame (See Organziation Demographics Design document).

g. When click a link that will bring up another page, display a popup with the pyramid image and a message such as of "Working, please wait..." as per standards.

h. When click a column header in a grid, check to see if the sort is currently on that column. If so, sort the list on that column ascending or descending (opposite of what it currently is). If not, sort the list on that column ascending. When click a column header to change the sort, restart the user on page 1 of the grid with the new sort order. Dates sort include the month, day and year. The Name column sorts on Last Name and then First Name.

i. When click a <u>Name</u> link (select the person), display the Person Manage tree in the left side of the screen and the Demographics Screen for that person in the right frame of the screen in View mode.

j. The tab order should default as top to bottom left to right unless otherwise stated.

V. Database routines

a. Search information is stored and new parties are inserted in tables as shown below:

Field on Screen	Database column	Database Table
Name	Name	SURVWEB.SURVWEB_PARTY_NAME (with name type of PRIMARY)
Party ID	PARTY_ID	SURVWEB.SURVWEB_PARTY
Organization Type	ORGANIZATION_TYPE	SURVWEB.SURVWEB_PARTY_ORGANIZATION
Description	DESCRIPTION	SURVWEB.SURVWEB_PARTY_ORGANIZATION
Rows Returned	N/a	N/a

Maximum Number of Rows	N/a	N/a

SURVWEB.SURVWEB_PARTY

PK	SURVWEB_PARTY_ID
	PARTY_TYPE
	STATUS
	DATA_SOURCE
	COMPLETED_DUP_PROCESS
	ENTRY_DATETIME
	ENTRY_USERID
	LAST_CHANGED_DATETIME
	LAST_CHANGED_USERID

SURVWEB.SURVWEB_PARTY_NAME

PK	SURVWEB_PARTY_NAME_ID
FK1	SURVWEB_PARTY_ID
	PARTY_TYPE
	NAME_TYPE
	BEGIN_DATE
	END_DATE
	NAME_PREFIX
	FIRST_NAME
	MIDDLE_NAME1
	MIDDLE_NAME2
	LAST_NAME1
	LAST_NAME2
	NAME_SUFFIX
	ORGANIZATION_NAME
	SOUNDEX
	FIRST_NAME_SOUNDEX
	ENTRY_DATETIME
	ENTRY_USERID
	LAST_CHANGED_DATETIME
	LAST_CHANGED_USERID

SURVWEB.SURVWEB_PARTY_ORGANIZATION

PK	SURVWEB_PARTY_ORGANIZATION_ID
FK1	SURVWEB_PARTY_ID
	ORGANIZATION_TYPE
	DESCRIPTION
	ENTRY_DATETIME
	ENTRY_USERID
	LAST_CHANGED_DATETIME
	LAST_CHANGED_USERID